

WISP SERVICE TRANSACTIONS FOR SALVATION ARMY

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The Service Transactions section of ClientPoint gives you the ability to identify client needs, provide services, or make referrals to agencies that can provide services needed. Service Transactions also creates a record of the services provided to the client. Service Transactions are vital to providing a complete and accurate picture of clients needs and the services provided to them. These service transactions can help you identify trends, service gaps in your community, counts of needs, and more.

The list of needs, services, and referrals that are to be tracked in Wisconsin ServicePoint are as follows:

AIRS Service Code	AIRS Service Code Description	AIRS Service Code	AIRS Service Code Description
BD	Food	BH-180	Emergency Shelter
BD-180.820-25	Formula/Baby Food	BH-180.850-53	Motel Vouchers
BD-500	Meals	BM-300	Household Goods
BD-500.150	Congregate Meals	BM-650.150	Clothing
BD-180.200	Food Pantries	BM-650.150-15	Diapers
BD-180.200-62	Occasional Emergency Food Assistance	BM-650.650	Personal/Grooming Needs
BD-500.350	Home Delivered Meals	BR-300.500	Mortgage Payment Assistance
BR-500	Medical Expense Assistance	BR-300.700	Rent Payment Assistance
BR-850.100	Bus Fare/Gas Money		
BR-900	Utility Assistance		
LH-670	Prescription Medication Services		
LX-040	Assessment for Substance Abuse		

Identifying a Need for a Service or a Referral

- Click on the Service Transactions gray tab from the ClientPoint profile screen.
- When you enter the Service Transaction section, WISP automatically brings you to the Add a New Need/Service screen.
- If this need/service should be associated with other household members, click on the checkbox next to each household name.

Client - roo, kanga (#1507)
Release of Info: None

ENTRY/EXIT
ROI
CASE WORKERS
SECURITY

Service Transaction - Add A New Need/Service
View Past Needs/Services Save Changes

Household members
To include household members in this need/service, click on the box beside each name. Note: Only members from the same household may be selected.
No Household members were found for this client.

Need / Diagnosis
Provider Hundred Acre Woods Community Services (#3718)
Date of Need / Diagnosis 08/07/2003
Need / Diagnosis -Select Need from Quicklist- -or- lookup

- Enter the following information for the need.
 - Provider**
 - If the need is for transitional shelter or motel vouchers select “*** **Emergency Housing**”
 - If the need is for emergency assistance other than a shelter, motel vouchers, or transitional living select “*** **Emergency Assistance.**”
 - Date service started or was provided**
 - Type of Need/Diagnosis**
 - ✓ Select from the quick list by clicking on the down arrow to show the list to choose the appropriate need.

Note: The code available for indicating a need in WISP is the AIRS Taxonomy of Human Services

- (OPTIONAL) If Need is Financial, enter amount.
- Fill out -. Overall Need Status and Overall Outcome.**

Overall Need Status	-Select-
Overall Outcome	-Select-

Overall Need Status should say CLOSED.
Overall Outcome should say FULLY MET

- Click “Save Changes.”

Note: If your agency or program provides the service that directly addresses the need or makes a referral for the identified need then **IT IS MANDATORY TO PROVIDE SERVICE OR MAKE A REFERRAL.**

Entering Services Provided

- Scroll down to *Services Provided for Need Identified* and click on “Add Service.”

Services Provided for Need Identified				Add Service
Provider	Start Date	End Date	Provider-specific Service	Referred By
No Services found for this need.				

- In the popup service window, ensure that check marks are placed next to each household member who received this service.
- Enter the following information for services provided.

Service Provided Data (Tanya Iverson)	
Provider	ServicePoint Sample Agency (#4038)
	-Select Need from Quicklist- -or- lookup
Service	Motel Vouchers
	BH-180.850-53
Service Start Date	06/06/2006 02 : 52 PM
Service End Date	
Provider-specific Service	-Select-
Cost Of Service 1	
Source 1	-Select-
Cost Of Service 2	
Source 2	-Select-
Service Notes	

1. **Provider** (should be filled out already)
2. **Service Start Date** is the date the service started
3. **Service End Date** is the date the service ended and for most of the service items like vouchers or meals will be only hours or a day after the Service Start Date.
4. Provider-specific Service – N/A
5. Cost of Service – N/A
6. **Source 1** – is the main source or two sources of funding for the service provided. It is a mandatory field when recording any service done with dollars from the State.

Possible funding sources for the picklist are as follows: ESG 2007, HPP 2007, THP 2007, EFSP, and SHP 2007.

- Click Save & Exit.

Enter Referrals/Make a Referral

If your agency is unable to meet the needs of a client, you can refer the client to another agency that might be able to help. To enter a referral, follow the steps below.

A referral occurs when:

- An appointment is made by the worker or client.
- There is a MOU or similar arrangement between one's programs such that the client will receive a service when they go to that organization.
- The client is given explicit direction to the program, and the program has a 100% acceptance rate, like a free meal.

Outstanding Referrals		Mass Referral	Add Referral
Referral Date	Referred By	Referred To	
No Outstanding referrals found for this need.			

- In "Outstanding Referrals" click on **Add Referral**.

- In the p **Referral Data (Tanya Iverson)** referring.

Referral Data (Tanya Iverson)	
Referral Need	Motel Vouchers
Referral Date	06/06/2006 03 : 18 PM
Referral Followup	
Referral Projected Followup Date	
Refer To	
Provider #1	-Select- -or- lookup , bed avail
Provider #2	-Select- -or- lookup , bed avail
Provider #3	-Select- -or- lookup , bed avail
Provider #4	-Select- -or- lookup , bed avail
Provider #5	-Select- -or- lookup , bed avail
<input type="button" value="Save Referrals"/> <input type="button" value="Cancel"/>	

- For referrals, enter the following information.
 1. Referral Date is the date you made the referral.
 2. Provider (Select the provider from the dropdown list.)
 3. You may refer the client to up to five different providers for one need
- Click on Save Referrals when finished

Special Considerations or Options

View or Edit Past Needs/Services

By default, ClientPoint automatically enters Add mode when you click on Service Transactions. If you wish to view past needs or services, click the button *View Past Needs/Services*.

This will give you a list of all past transactions. To view or edit any of them, click on the Edit Icon (pencil) next to the transaction in which you are interested.

Recording a Service Transaction for Transitional Living

A service transaction should be created when you fill out the entry exit. The service item should have a start date equivalent to the entry date in the Entry/Exit. The service item should have an end date equivalent to the exit assessment in the Entry/Exit.

Recording a Service Transaction for Motel Vouchers

A service transaction should be created for a Hotel/ Motel Vouchers. The service item should have a start date equivalent to the first night the individual or household began staying in a motel/ hotel and the end date should be the last night the individual or household stayed in the hotel motel.

- 01/01/2006 (start date) – 01/09/2006 (end date)

